Western Europe

- France/Germany/U.K./Italy
- Scandinavia
- Benelux
- Spain/Portugal
- Austria/Switzerland/Ireland/Greece

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Western Europe

Austria	Germany	Norway
Belgium	Greece	Portugal
Denmark	Ireland	Spain
Finland	Italy	Sweden
France	Netherlands	Switzerland
		United Kingdom

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Market Characteristics

- Country markets
- Vertical markets (industry sector)
- Product sectors (delivery modes)

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Regional Heritage

- North Europe
  - Processing services
- Mid-Europe
  - Professional services
- South Europe
  - Software products

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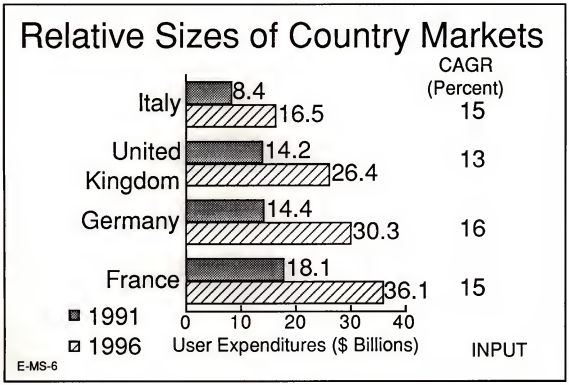

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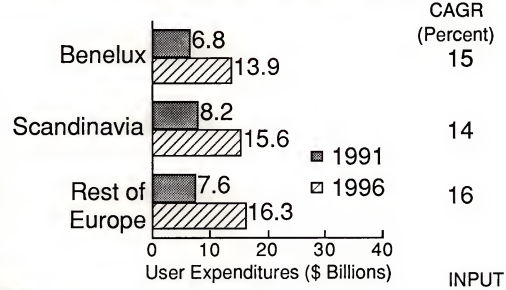
Relative Sizes of Country Markets



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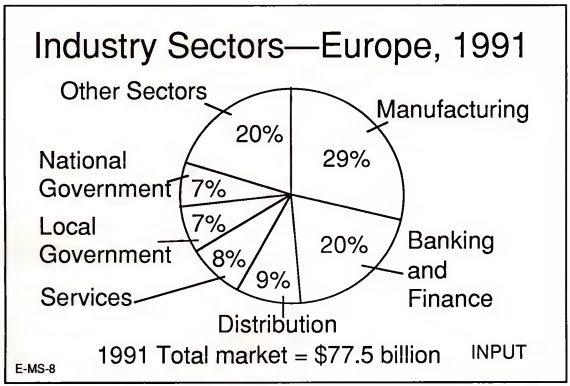

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Industry Sector Variables

- Europe/global market
- Recession
- Eastern Europe
- Aging population
- Downsizing
- Outsourcing

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Europe

Software and Services

Workshop Agenda

- New end-user demands
- Fierce competitive pressure
- Lower market forecasts
- Challenge to professional services

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Peter Lines

Vice President
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E-MS-11

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Roger Fulton

Consultant
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